



Transitional Assistance

**San
Bernardino
County**

***Call Center
Technology***



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- **Customer Service Center (CSC) Background:**
 - Introduction.
 - Why was the CSC created?
- **Technology Enhancements:**
 - Live Chat,
 - Visual Interactive Voice Response (VIVR), and
 - Predictive Handling.
- **Identifying Needs and Finding Solutions to Challenges:**
 - Authentication, and
 - Educating customers on self-service options.
- **Customer Service Survey.**

Customer Service Center (CSC) Introduction

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The Transitional Assistance Department (TAD) implemented a centralized Customer Service Center (CSC) to provide **telephone**, **Visual Interactive Voice Response (VIVR)**, and **Live Chat** services for customers receiving California Work Opportunity and Responsibility to Kids (CalWORKs), CalFresh, and Health Care Programs (HCP).

San Bernardino County's Customer Service Center went live August 5th, 2011.



Transitional Assistance

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TAD anticipated an increase in staff workload with the implementation of the Affordable Care Act (ACA) and realized ACA would expand TAD's customer demographics by bringing in a broader range of customers inquiring about healthcare services. TAD examined its business practices and invested in technology to meet the needs of ACA.

The change of business processes included establishing the following:

- A Task based work environment - Process Approach to Case Excellence (PACE),
- Customer Service Call Center (CSC), and
- Processing Center (PC).



Interactive Voice Response (IVR) enhancements were developed by TAD to solve challenges encountered by the CSC. The following technology enhancements have improved service to our customers:

- Live Chat,
- Visual Interactive Voice Response (VIVR), and
- Predictive Handling.

The screenshot displays the C4Yourself Live Chat interface. On the left, there's a sidebar with 'Folders' including 'My Work', 'My Activities', 'Current', 'Completed', 'My Searches', 'My Folders', and 'Cases'. The main area shows a 'Chat Inbox' table with columns: Key, Activity ID, Customer Name, Activity Duration, Chat Status, Time Waiting For Reply, and Queue Name. The table lists two activities: one for Diana Prince (Activity ID 446667, Duration 00:26:37, Status 'Waiting for you to reply', Time 00:00:07) and one for Bruce Wayne (Activity ID 446602, Duration 01:02:37, Status 'Waiting for customer to r...', Time 00:11:15). Below the table is a 'Chat' window with a message history and a text input field. The message history shows a conversation between Diana Prince and a support agent (36268). The chat window also has buttons for 'Complete', 'Transfer', and 'Notes'. At the bottom left, there's a 'C4Yourself' logo and a 'Start Chat' button.

Key	Activity ID	Customer Name	Activity Duration	Chat Status	Time Waiting For Reply	Queue Name
2	446667	Diana Prince	00:26:37	Waiting for you to reply	00:00:07	C36_EN_Chat
1	446602	Bruce Wayne	01:02:37	Waiting for customer to r...	00:11:15	C36_EN_Chat

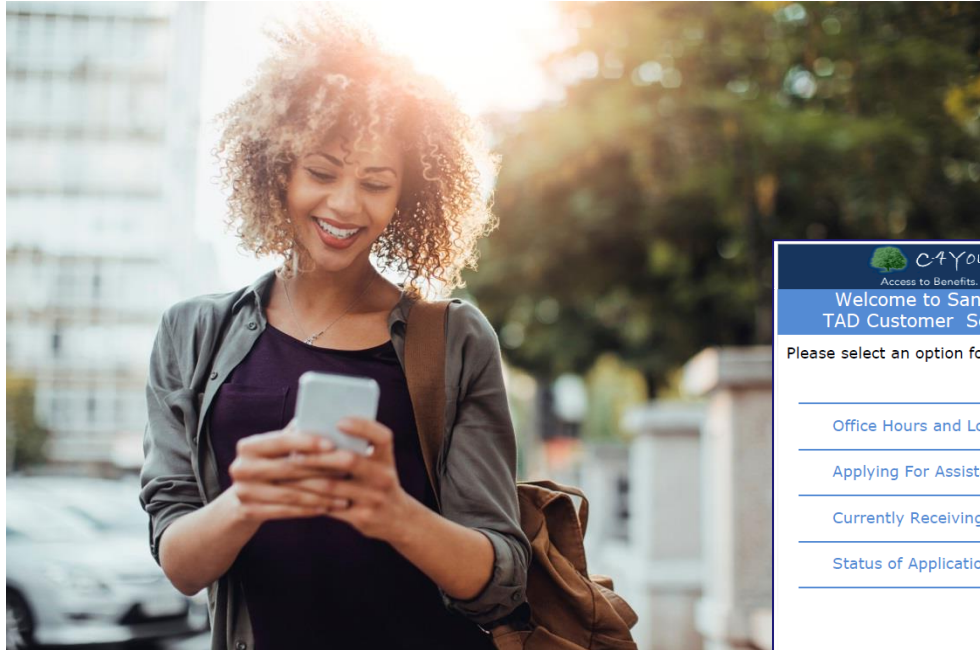
Chat window message history:

Diana Prince: so as of currently i will no longer be getting calwork but i will be getting calfresh in the amountt of 62
You are now chatting with 36268
36268: Greetings. My name is Ms. Johnson. Were you just wanting to verify your benefit amount?
Diana Prince: yes just o make sure cause it seems its changed a few times
36268: Not a problem. I am happy to check that for you. Do you know your case number?
Diana Prince: 1234567

The Live Chat link on C4Yourself allows customers to “chat” online with a CSC Eligibility Worker (EW). A CSC EW is available to assist customers after they log in to their C4Yourself account.

Customers calling the CSC have the option to access information and complete requests visually using their smartphone.

If the visual option is selected, a text will be sent to the customer's phone to connect to the VIVR.

A screenshot of the C4Yourself mobile app interface. The header shows the C4Yourself logo with the tagline "Access to Benefits. Simplified." Below this, it says "Welcome to San Bernardino TAD Customer Service Center". A prompt asks the user to "Please select an option for your call today:". There are four menu items, each with a right-pointing arrow: "Office Hours and Locations", "Applying For Assistance", "Currently Receiving Assistance", and "Status of Application". At the bottom, there is a "Feedback | Privacy Statement" link with a right-pointing arrow.

Once connected to the VIVR, customers can:

- View office hours and locations.
- Apply for assistance.
- Request a Personal Identification Number (PIN).
- View benefit information.
- Request forms.
- Check the status of submitted documents and applications.
- Report changes.
- Take pictures of documents related to specific reported changes (i.e., change of address and household compositions) and upload the pictures to their case.
- Request to speak with a worker.

The screenshot displays the Cisco Finesse VIVR interface. At the top, the browser address bar shows the URL: https://pfipg02a.c-ivivr:8443/desktop/container/7/locales/en_US. The interface includes a navigation bar with links like Home, Visual IVR, and a status bar showing the agent's name (Sandra Rosado) and extension (3736313).

The main content area is divided into several sections:

- Queue Statistics:** A table showing call statistics for various queues.
- Agent Statistics:** A table showing call statistics for individual agents.
- IE Links:** A section with links to eGain Reports, NICE Portal, Live Chat, WFM Agent Link, and WFM Supervisor Link.
- Message Of The Day Reader:** A section displaying a message from Darrin Kearney at 09:13 AM on Jun 05, 2017.
- CSC Service Level Escalation – Code Red:** A section with a red background and white text.

The bottom of the interface shows a copyright notice: © 2010-2016 Cisco Systems, Inc. All rights reserved. Cisco Finesse v10.5(1).

Predictive Handling is a personalized IVR experience designed to anticipate the reason for the customer's call. Using caller identification, the IVR will check the phone number the person is calling from to match with the Primary Applicant/Recipient in C-IV. If a match is found, the IVR system will:

- Review current case information,
- Determine the most likely reason for the call, based on case information, within a 37 day window, and
- Ask the customer to select from one of the options given:
 - Upcoming appointment,
 - Missed or prior appointment,
 - Re-Evaluation (RE) packet,
 - Denial or discontinuance of benefits,
 - Reduction in benefits,
 - Change in benefits of approval of benefits, or
 - Calling to report a change to case information.



Predictive Handling benefits customers by reducing wait times. The customer is provided various self-service options rather than waiting in a queue to speak to a worker.

New self-service options include:

- Requesting a replacement Electronic Benefit Transfer (EBT) card, and
- Confirming, canceling, or rescheduling an appointment.

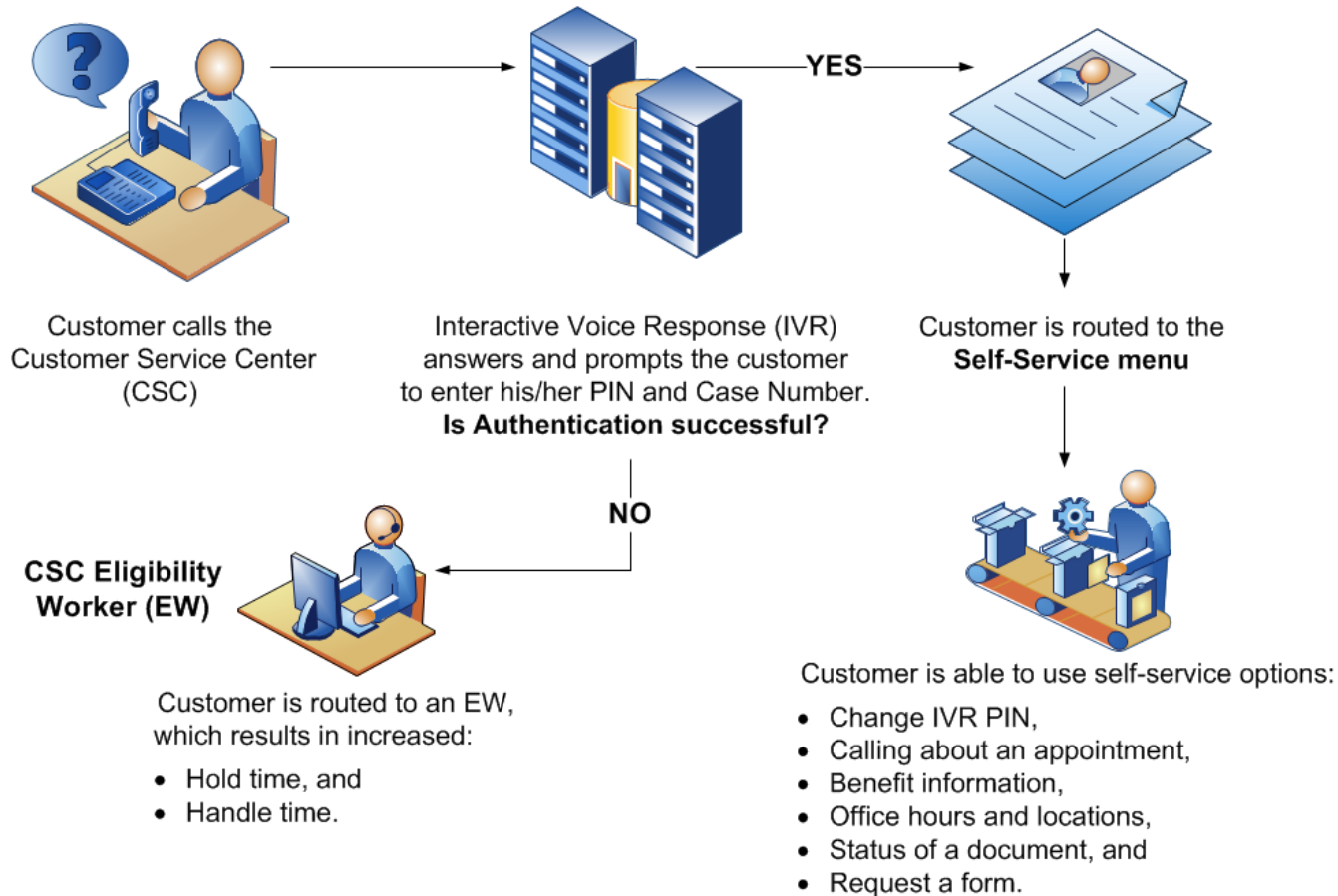


Two areas which prompted technology enhancements were:

- Authentication, and
- Educating customers on self-service options.

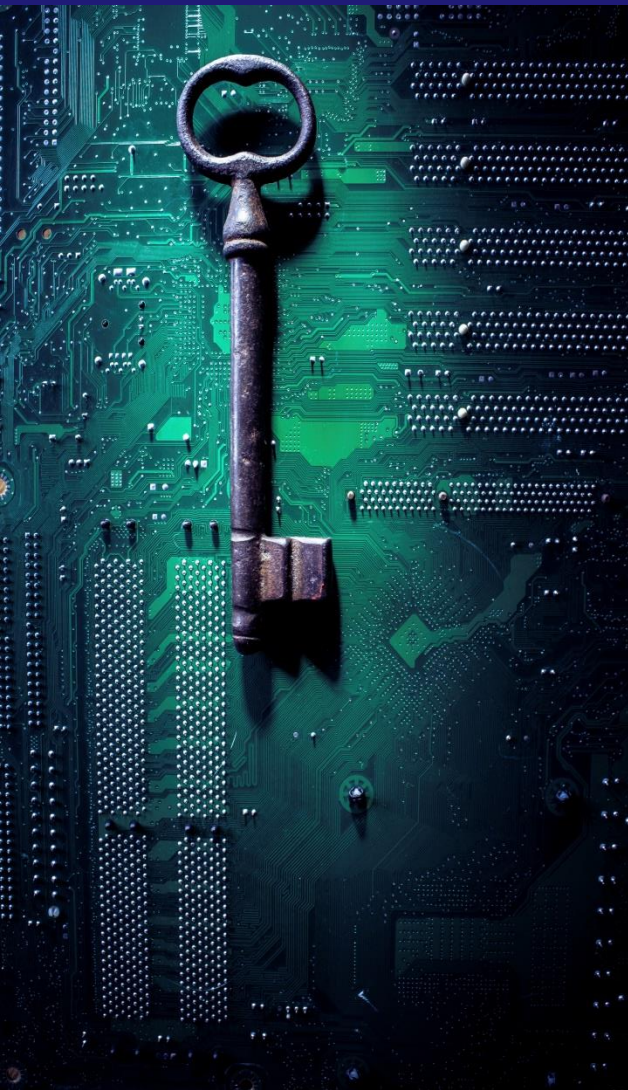


One of the first challenges faced by San Bernardino County was ensuring customers authenticated into the IVR.



How are we meeting this challenge?

- Offering multiple ways customers can authenticate:
 - Case Number and PIN,
 - Voice Log In, or
 - Social Security Number (SSN) and birthdate.
- Advising customers of the benefits of authentication at different points of contact.



Customers can log in to the IVR and access case information using only their voice. Customers speak a passphrase instead of entering a case number and PIN or SSN and birthdate.

Voice Log In functionality provides the following benefits for customers:

- Heightened security - **Biometric Voice Print** software **analyzes over 3,000 voice recognition points** and eliminates potential case information breaches.
- Faster log in and access to benefit information.
- Ability to access self-service options, receive benefit information, and request forms.

The second challenge faced by San Bernardino County was informing customers of the available self-service options.

How are we meeting this challenge?

- **Social Media Postings** – Facebook and County webpages.
- **Self-Service Tutorial** - Pilot to educate and assist customers at intake.
- **Self-Service Campaign** - Training staff on available technology and how to troubleshoot with customers.
- **IVR Hold Message** - Reminds customers of self-service options available.



Our goal is continue to enhance our processes.

To achieve this, San Bernardino County implemented a survey at the conclusion of every call to gage customer satisfaction and identify areas needing improvement.



How are the survey results utilized?

- Customers are contacted to resolve concerns or obtain additional feedback.
- Recorded calls associated with the survey are reviewed. Identified trends and best practices are used to provide coaching to staff.
- Staff with a high number of surveys and a 90% or higher satisfaction rate are recognized for their excellence.



Questions?